



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

Introduction

CalFile was developed in 2003, to provide taxpayers with a free, secure, and direct online application to e-file their state income tax return. Per survey responses, the most common reasons for using CalFile are:

- It's fast.
- It's free.
- It's convenient.

CalFile eases the filing burden for taxpayers, because it eliminates the need to predetermine which form to file. The taxpayer just answers basic questions to complete their return.

CalFile has grown in popularity by over 29% since its first full filing season. In 2004, 109,650 CalFile returns were filed, and in 2007, 141,850 CalFile returns were filed. CalFile is available to more than 6 million taxpayers and now, for the first time, is available in Spanish. Since Hispanics are one of the fastest growing demographic groups in California, Franchise Tax Board (FTB) acknowledges the importance of implementing CalFile in Spanish.

Generally, CalFile is available to taxpayers who:

- Were a California resident all year in 2007.
- Are filing an original tax return for 2007.
- Claim standard or itemized deductions.
- Claim no more than 5 dependents.
- Have a federal AGI up to:
 - \$155,416 for single and married/registered domestic partner filing separately.
 - \$233,129 for head of household.
 - \$310,837 for married/registered domestic partner filing jointly and qualifying widow(er).

For more information, preview CalFile and refer to the [CalFile qualifications](#).



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

Facts

Description

CalFile is a direct online application developed by the Franchise Tax Board for taxpayers to complete and e-file their state personal income tax return. CalFile eases the filing burden for taxpayers by guiding them through an easy question and answer process. Taxpayers do not need to know which tax form to file to use CalFile; all they need to verify is that they meet the CalFile qualifications. Also, CalFile is a quick online process, which on average takes 15-30 minutes to complete. Furthermore, within the CalFile application, there are help files that assist the taxpayer with questions they may have. We hope to ease the filing burden further for our Spanish-speaking individuals with CalFile Spanish, which performs exactly like the English version.

Taxpayers can e-file their tax return using CalFile or CalFile Spanish from January 2, 2008 through October 15, 2008.

Eligibility

Over 6 million taxpayers qualify to use CalFile. CalFile is available to all 540 2EZ and 540A filers, and some 540 filers. CalFile accepts income of up to \$310,000, itemized deductions, and the following tax credits:

- Personal exemption credit.
- Senior exemption credit.
- Blind exemption credit.
- Dependent exemption credit.
- Nonrefundable renter's credit.
- Child and dependent care expenses credit.

Generally, CalFile is available to taxpayers who:

- Were a California resident all year in 2007.
- Are filing an original tax return for 2007.
- Claim standard or itemized deductions.
- Claim no more than 5 dependents.
- Have a federal AGI up to:
 - \$155,416 for single and married/registered domestic partner filing separately.
 - \$233,129 for head of household.
 - \$310,837 for married/registered domestic partner filing jointly and qualifying widow(er).

For more information, refer to the [CalFile qualifications](#).

[more facts](#)



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

Facts

However, CalFile is not available to taxpayers who:

- Are filing a 2007 return on behalf of a person who died.
- Are requesting a military- or disaster-related extension.
- Need to claim a disaster loss.
- Have business or farming income or loss.
- Have capital gains or losses.
- Have income or loss from rental real estate, royalties, partnerships, S-corporations, estates, trusts, REMICs, etc. (federal Schedule E).

For more information, refer to the [CalFile exceptions](#).

Benefits of CalFile

- Now available in Spanish for the first time.
- Free.
- Fast.
- Easy.
- Convenient.
- Direct-to-government e-filing option.
- Available 24-hours a day, 7 days a week.
- Refunds usually in less than 1 week with direct deposit.
- File now and pay later options.*
- Instant confirmation that a return has been received.

Taxpayers can e-file their tax return using CalFile or CalFile Spanish from January 2, 2008 through October 15, 2008.

** Taxpayers can file their return and schedule their payment to be deducted from their bank account at a later date. For example, they can file their return now, and schedule their payment to be made April 15. Or, the taxpayer can return to our Website and use [Web Pay](#) to make a payment after they use CalFile to e-file their return.*



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

FAQs

Who is eligible?

You can use CalFile if you:

- Are filing a 2007 California personal income tax return.
- Were a California resident all year in 2007.
- Use any filing status.
- Claim up to 5 dependents.
- Have a federal Adjusted Gross Income (AGI) up to:
 - \$155,416 for single and married/registered domestic partner filing separately.
 - \$233,129 for head of household.
 - \$310,837 for married/registered domestic partner filing jointly and qualifying widow(er).

How much do taxpayers pay to use CalFile?

Nothing. CalFile is free e-file for all taxpayers who qualify to use it.

Do taxpayers need to know what form to use?

Taxpayers do not need to know which form to use with CalFile. CalFile guides the taxpayers to answer basic questions, and CalFile automatically completes their state tax return. The taxpayer only needs to verify that they meet the CalFile qualifications. If the taxpayer meets the qualifications they can use CalFile to e-file their return. For more information, refer to [CalFile qualifications](#).

What software is required to use CalFile?

- Adobe Acrobat or Adobe Reader (version 6.0 or higher) to view and print the return. They can download the latest version of Adobe Reader for free from [Adobe](#).
- A [compatible browser and operating system](#).

[more questions](#)



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

FAQs

If taxpayers owe money can they use CalFile?

Yes. Taxpayers who use CalFile and owe money, can choose to pay by check, credit card, or send the payment electronically with their return. They can e-file their return now, and schedule their electronic payment for a later date. The taxpayer can also visit our Website and use **Web Pay** to make a payment after they use CalFile to e-file their return. Taxpayers can review all of their options on the **Refund or Payments** page within CalFile.

Can taxpayers use CalFile if their last name changed in 2007?

Yes. However, if a taxpayer's last name changed in 2007, they need to enter the last name they used on their 2006 tax return to access CalFile. Then they need to enter their new last name on the **Name and Address** page in CalFile.

Taxpayers who have not previously filed a California tax return need to call our Taxpayer Services Center. When they call they need to provide either their California driver's license or California identification number. Please call:

- From within the United States: (800) 353-9032
- From outside the United States: (916) 845-6600 (*not toll-free*)

Assistance for Persons with Disabilities: We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments, please call TTY/TDD (800) 822-6268.

What is new for CalFile this year?

There are three significant changes to CalFile this year.

- CalFile is now available in Spanish. Taxpayers can choose to use CalFile in either English or Spanish.
- Taxpayers no longer need to enter their FTB-assigned Customer Service Number (CSN) to access CalFile. Instead they will enter their social security number and last name.
- Taxpayers need to print and sign the Form 8453-OL, California Online e-file Return Authorization for Individuals, and keep it with their records.



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

Testimonials

"Free, fast, and easy!"

"Secure, fast, free, sent to you (FTB) directly."

"Speed of refund, FREE, easy!"

"All the figures are calculated for me and the process is fast & free."

"Free, convenient, faster than paper filing, secure! Thank you for e-file."

"Less confusing than the paper form, the computer does the incomprehensible calculations for you."

"No paper, no postage, more accuracy at FTB's end."

"Convenient but more importantly, self explanatory with help readily available."

"Allows more efficient tax form processing by state government, is free to filers, AND does not involve third parties."

"Just wish Federal was as smooth and convenient and free and fast and secure."

"I could do it and send it out on my own time. I didn't have to worry about getting a confirmation receipt from the post office."



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

Logos

Click on the links below to open different variations of the CalFile Logo.

Low Resolution (for web) - jpeg file

[Color CalFile Logo](#)

[Black and White](#)

High Resolution - jpeg file

[Color CalFile Logo](#)

[Black and White](#)



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

Demo

Click on the link below to open a demonstration of the CalFile program.

[CalFile Demo](#)



Introduction

Facts

FAQs

Testimonials

Logos

Demo

More

More

For more information check out the FTB website:

ftb.ca.gov